77

77

THE REGIONAL MUNICIPALITY OF WATERLOO

INDUSTRIAL LAND SURVEY

January, 1980

Department of Planning
and Development

Bill Thomson, Commissioner

THE REGIONAL MUNICIPALITY OF WATERLOO

INDUSTRIAL LAND SURVEY

BACKGROUND

In September, 1978 the Regional Department of Planning and Development published a report entitled Industrial Land Needs and Supply 1976-2001. This report analysed the potential demand for and supply of industrial land within the Regional Municipality of Waterloo over the twenty-five year period. The report pinpointed problems in the availability of serviced industrial land. In addition, in order to meet modest growth needs the report indicated problems in the distribution of such lands. The City of Kitchener was short of industrial land to meet its traditional role as the major industrial centre in the Regional Municipality. The study considered some implications of a diminished role for Kitchener as the prime industrial centre in the area, and proposed some alternative solutions in balancing the distribution of deficits in the supply of industrial land.

Since that time and as part of our continuing responsibility to review economic trends within the Regional Municipality, Regional staff have inventoried and analysed the current situation in industrial land supply.

One purpose of this report is to review and comment on the inventory of industrial land and buildings within the Regional Municipality of Waterloo. The report will also consider how available such land and buildings are to meet expected needs for industrial space within the Region. "Industrial Land" includes land for which a building permit could be issued. "Industrial Buildings" are buildings designed, built, zoned and serviced for manufacturing, processing, wholesaling, storage and related uses. The report will deal with the supply of vacant industrial land, the availability of vacant industrial buildings, and the probable market for industrial land.

This report was researched mainly by Mr. F. Watty, Senior Planner with the analysis and conclusions having major input from the Directors, Messrs. Dorfman and Thompson and the final editing and conclusions those of the Commissioner.

THE INDUSTRIAL DEVELOPMENT CLIMATE

In recent years the Regional Municipality has experienced a slowdown in the rate of industrial expansion as compared to the early 70's. There is one school of thought that feels the major reason for this is due to a lack of industrial land in the City of Kitchener. However, it is also evident that this slowdown is part of a National and to a greater extent, a Provincial trend which does not appear to be stabilizing as yet.

Nevertheless, while the rate of industrial growth in the Region may be slowing down, consumption of serviced industrial land within the Region continues due to:

1) Arrival of some new industries
2) Expansion of local industries
3) Consolidation of outside operations within the Region
4) Warehousing requirements for commercial operations

In order to accommodate this growth, land needs can be met by:

1) Zoning and servicing more industrial acreages according to existing official plans.

2) Redeveloping older industrial lands which have good access, for new manufacturing and warehousing/ storage uses.

3) Encouraging existing manufacturers to use more of their site for industrial purposes.

4) Locating new industrial operations in vacant industrial buildings.

Since 1978 very little new industrial land has been added to the inventory for the Municipalities within the Regional Municipality. In fact, some industrial land has been lost to non-industrial uses. Sales of public and private land in already serviced industrial parks or older industrial areas have continued, though at a slower rate. This slowing down may be due to any one or all of the following:

1) Preference of private landowners to build facilities for lease rather than sell serviced land.

2) Unwillingness of some landowners to sell to certain types of industry.

3) Lack of sewage treatment capacity in some municipalities to accommodate new industrial uses which have a high volume effluent.

4) High capital cost for site preparation, plant construction or expansion at this time.

5) Perceptions by some industrialists of a diminishing Local, Provincial and International market due to growing costs of production, inflation, falling real dollar values and general caution in investment.

6) Policies in some municipalities on the total acreage of public industrial land to be sold in any given year.

7) Limits on the maximum size of parcel to be sold by public agencies due to shortages of industrial land within the municipality.

Much of the new industrial activity which has occurred in recent years has been in "build-for-lease" industrial malls which cater to a very specialized market, and which typically do not create many jobs and in small service type industries.

During the course of this study a number of people and agencies were interviewed by senior staff. The sources of information in most cases are confidential. Those people interviewed were industrialists already situated within the Region and contemplating expansion, industrial spokesmen from outside the Region considering a location within the Region, local municipal employees, representatives of various chambers of commerce and boards of trade, members of the real estate boards in the Region, staff of the Ministry of Industry and Tourism, members of local consultant firms and a few members of financial investment firms in Ontario. In the course of interviewing these people on why they were considering the Region as a place for new investment, or why they were expanding, or the general interest or non-interest of investors in our Region, or the problems of developing in our Region, or what kind of investments could be attracted to this Region or what the municipalities and/or the Region could do to attract industrial investment, a number of miscellaneous things were said and opinions offered that should be considered in order to refute, confirm and/or rectify in order to create an atmosphere that might be more conducive for industrial investment that could provide job opportunities within the Region. These opinions and statements aggregated from the interviews are as follows:

1) Potential buyers are still looking for serviced industrial land within the Region though not on the same scale as in the early 1970's due to local known shortages.

2) Many prospects find the process of buying public land cumbersome because of:

   (a) a perceived lack of coordination among a number of departments involved in the sale of industrial land.

   (b) in some instances there is a lack of a decisive policy on the part of some councils on the sale of industrial land.

3) Private land is priced too high relative to public lands in and around the Region and private land not far from the Region and conditions of "build-to-lease" are often unacceptable, given present market conditions.

4) While every municipality gives priority to existing industries, many have done their own planning and are aware of local conditions and in most cases have already provided for expansion plans. Yet many people interviewed thought that while existing industries should not be neglected, promotional activities should be geared to a greater degree, to attracting new industries.

5) Though rents and leases in older industrial areas may be lower than in new industrial parks, fire and building code regulations that are enforced when rehabilitating older buildings, and insurance costs often offset any perceived economic advantages.

6) The practice of locating a wide variety of commercial, office and recreational uses on prime industrially zoned land consumes high value and scarce land needed for manufacturing purposes and leads to premature shortages and frustration among industrial investors.

7) Although representatives of various municipalities, chambers, consultants and investment firms redirect enquiries to other municipalities in the Region when they cannot satisfy an enquiry within their own area, in practice this has not been as successful as hoped. We asked a number of possible investors the reason for this apparent lack of interest in going to the next municipality in the Region and the impression given was that the urban municipalities of the Region are not yet perceived as one general market area.

THE PROVINCIAL INDUSTRIAL PROMOTION STRATEGY

At a meeting of Ontario Industrial Development Commissions held in Toronto on January 23, 1980, the Province of Ontario through the Ministry of Industry and Tourism, released an outline of its approach to industrial promotion and development for the 1980's. The Ministry indicated that the Province of Ontario was experiencing a major slow-down in economic activity. In 1979 the Gross Provincial Product 1/ for Ontario increased 2.75% over 1978 and in 1980 it was expected to increase by 1% over 1979. Notwithstanding, the Ministry felt that there were grounds for optimism. In 1979, 130,000 net jobs were created in the Province of which 35,000 were in manufacturing. In 1979, manufacturing orders were up, so also were manufacturing shipments and profits in manufacturing. It was also estimated that the manufacturing sector was operating at over 90% capacity. This indicates that in order to meet moderate increases in demand, this sector may have to undertake major investment in new plants or expansions. However, it was recognized that rising energy prices, increased transportation costs and higher interest rates generate higher production costs These together with lower per capita disposable incomes could dampen the rate of economic growth.

Recognizing the need to counter the problems of rising costs, shrinking markets, increasing "offshore" competition, and increasing investment incentives from other Canadian and foreign jurisdictions, the Province has designed an aggressive industrial program. The main elements of the strategy are as follows:

1) A shift from a reactive assistance in technology to aggressive marketing and promotion.

2) A change in emphasis from trying to meet the needs of all manufacturers to selectivity, targetting and programming of those manufacturing sectors having the best capabilities for success.

3) To move from a focus on general problem solving to seeking out areas of real development opportunity.

4) Provision of increased funding to the Ontario Development Corporation and the Employment Development Fund as a vehicle for assisting medium and large scale industrial development.

1/ Gross Provincial Produce is the total value of goods and services produced in the Province.

5) Instead of concentrating efforts in Queen's Park to place more emphasis on field offices in Ontario, the United States, Europe and Japan.

6) Closer cooperation with Federal, Provincial, Regional and Local Government.

7) Special emphasis on small and medium size operations which appear to have the greatest growth prospects.

As a consequence of this strategy, the Ministry will identify and actively pursue those manufacturing operations having high growth prospects. One sector already identified is the automobile and automotive parts industry. By the same token the Ministry will not be active in attracting industries which they consider to have low potential.

This new Provincial strategy could have implications for the Regional Municipality of Waterloo Planning Area.

1) While Ministry officials did not indicate how new growth and lagging manufacturing operations will be identified, it is obvious that some manufacturing operations which have limited growth prospects on a Provincial basis, may be quite thriving on a municipality or regional basis. A Provincial policy to not support such manufacturing sectors may in fact cause their decline. These should be looked at in some depth where found within our Region so we will be aware of the consequences, if indeed these specific industries are declining.

2) Municipalities must be concerned over how "manufacturing sectors" are defined. It may be that a marginal operation is the key factor in determining whether or not linked industries (e.g., supply or servicing) continue. If only the restricted definition is held, it will mask the true effect of closures.

3) Where problem industrial sectors are identified, the Ministry as well as the affected municipalities should plan for a smooth transition to alternative economic activities for the community as a whole and re-employment for the workers. Provincial strategies are all well and good, but if they do not reflect human concerns, they could lead to mistrust and failure and we have a responsibility to pinpoint problems before they arrive on our door step.

4) Reference was made at the subject meeting to possible limited growth prospects for new meat processing plants in the Province of Ontario. It may be that new meat processing plants will not be encouraged to locate in the Province. Increased demand however, will be met by plant expansions, rationalizations and consolidations. Meat processing is a major industrial operation in this Regional Municipality. Several area municipalities will be affected if this becomes a Provincial strategy.

5) When the Province has identified a good candidate operation it will be up to the various municipalities to decide whether the size, type, demands of the industry etc., are acceptable to them. Because of the proximity of Kitchener, Cambridge and Waterloo, this can be either good or bad. A major new high wage industry moving into one of the three could disrupt the wage structure and labour stability in other sectors of the entire area. On the other hand, an area-wide supply of workers, housing, etc., could be a plus in attracting industry. Perhaps the municipalities could cooperatively work together so such an evaluation could occur in a larger than area municipality context.

6) To date the advantages of industrial location within the Region have been promoted at various intensities on an area municipality basis. As industries become increasingly objective in the reasons for plant locations, perhaps the area municipalities should explore the possibilities of joining together with a joint effort in supplying information, information packages, statistics, general public relations, etc., and thus achieve greater specific prominence. The Ministry will probably respond best to areas which can present their case best.

7) It is important to also recognize Provincial support for the industrial complex in the Nanticoke area and perhaps new developments at the Bruce Nuclear installation, both close to our Region and which may decrease the size of the pie available to this Region. It is true that there will be some spin-off benefits in the construction and operation phases of these complexes, to this Region. We should therefore realize that Provincial initiatives should not replace continued local initiatives. If anything, the latter should be even more aggressive.

Some Inter-Regional Comparisons

The major existing well established centres of competition for municipalities within this Region in attracting industries, are Burlington, the City of Guelph, the City of Brantford, City of Stratford, the Town of Oakville and the City of Hamilton. These centres generally share the advantages of access to the Metropolitan Toronto markets, good road and rail access and ability to draw on a large labour force supply area, not unlike those centres within our Region. While there may be some variation in attractiveness among them due to relative size, social and community facilities such as schools, universities and cultural centres, it is felt by many in the industrial sector that relative land prices play a major role in deciding which centre will attract more industries.

Special mention should be made of the potential impact of the proposed Nanticoke Industrial Complex on future growth and development in the Regional Municipality of Waterloo. The Nanticoke Industrial Complex is a project undertaken jointly by the Government of Ontario, the Steel Company of Canada (Stelco), Ontario Hydro and Texaco, to establish a major industrial basin on Lake Erie near Nanticoke. These several agencies through coordinated action propose to develop and promote an integrated industrial park complex together with a major residential area. It has been estimated that the total capital cost of these investments is in excess of four billions of dollars - exclusive of the investment from new industries which might be attracted to this site, and the housing and other amenities required to support this project which is the largest concentrated multi-corporation development of its kind in Canada. Also underway is a project for the creation of a new town, Townsend, as a residential and service community for workers in the industrial complex.

However, assuming that the Nanticoke and Townsend Developments proceed as planned, the resultant impacts on the Regional Municipality of Waterloo may be identified as follows:

1) During the development phases of the project when plants are being constructed and equipment assembled, contractors and skilled labour in the Waterloo Region could gain employment and contracts to help perform these tasks. To the extent that builders and sub-trades in Waterloo Region can find lots and sub-contracts in the Townsend site these benefits will also extend to the residential portion of this phase.

2) Once industry gets into production, Stelco soon and others later, there may be an effect felt within the Region with parts of the unemployed skilled labour force within the Region migrating to Nanticoke and depending on relative rates of pay and benefits some that are employed within the Region.

3) As the area grows and establishes itself a prime industrial area in Ontario besides a new Town, some industry which might be considering this Region as a location could find Nanticoke more attractive and thus of course not come here. Some existing industries finding it difficult to expand within the Region might also find Nanticoke more attractive, everything else being equal, and move away.

These developments in the Haldimand-Norfolk Area are underway and the effects on municipalities within this Region must be assessed and new strategies devised in order to compete with this new and attractive industrial area.

Coupled with the Nanticoke complex is the proposed new Great Lakes harbour and industrial complex now under intensive study at Dunnville. Although good for Ontario they will affect this Region and the means to take advantage of these happenings for this Region must be considered cooperatively now.

In May 1979, the Industrial Development Commissioner for the City of Guelph compiled an inventory of available industrial land, asking prices, conditions of sale, etc., for several major Southern Ontario Municipalities (Appendix 1). The inventory shows that public industrial land prices in the City of Guelph generally are consistent with those within the Regional Municipality of Waterloo. In Brantford, average prices are lower and in Stratford the quoted price is $16,000 - $18,000 per serviced acre, a substantial difference from the Waterloo average of $30,000. On the other hand, the Regional Municipality of Hamilton-Wentworth shows a considerable range from $7,500 - $15,000 per acre in Ancaster to $40,000 - $65,000 per acre in Hamilton. Stelco in Nanticoke is apparently offering serviced industrial land at $32,000 per acre. The Province has not set a price for their industrial land as yet.

In a recent publication by the Province of Ontario "The Profit Centre", given wide distribution in the U.S.A., the following quote is significant; "The six year, U.S. $1.8 billion investment: there are 13,589 hectares (33,565 acres) of fully serviced industrial land available from 314 municipalities across the Province. Median price: U.S. $14,825 per hectare (U.S. $6,000 per acre). Fully serviced means power, fresh water and sewerage; connected up and ready to go." The question we raise is where in Ontario is this $6,000 U.S. (say $7,000 per acre Canadian) price per acre for fully serviced industrial land? It may be important for us to know the answer.

Within the larger Southern Ontario context it will be noted from Appendix 1, that there is a wide range in land prices with the highest price being quoted in municipalities adjacent to Metropolitan Toronto. Mississauga (Peel Region), Hamilton, Oakville areas being the highest priced. It will also be noted that privately owned land consistently out-prices public land even where there are extensive public holdings. Based on the results of the Guelph survey as presented, another important fact should be noted. This is the extreme variability in lot size coverage requirements. This is particularly significant in the case of land purchased from a public authority where because of the favourable price differential manufacturers may be tempted to buy parcels in excess of their immediate requirements, for either speculative, expansion or protective reasons. Some municipalities do not have a lot size coverage requirement for example Guelph, others such as London may require a 75% lot coverage limit.

With the critical shortage of industrial land and the high private and social costs in taking agricultural land out of production and converting it to industrial use in areas where the prime food growng soils predominate, the need for more realistic minimum site coverage policies in municipal zoning by-laws should be reviewed immediately to determine if they are realistic.

It is difficult to identify the extent of influence of public land supply on the purchase price of serviced industrial land. Much will depend on the location of the subject lands and conditions of sale, such as minimum value of buildings to be built or minimum site coverage. Where municipalities may have a ceiling on the amount of public lands to be sold per year or on the maximum size of a lot, these could have an additional effect.

However, the presence of a reservoir of publicly owned serviced industrial land could be effective in controlling price increases for privately owned land and, subject to municipal policy, permits local decision-makers to determine the rate, scale and type of industrial expansion they wish for their community.

SOURCES OF INFORMATION FOR INVENTORY

Data compiled for this report came from many sources but have been organized on a relatively consistent basis for the three cities.

The office of the Commissioner for Economic Development in the City of Cambridge provided data on vacant industrial land and buildings in that City as did the Chamber of Commerce for the city of Kitchener.

Data was also collected from the Waterloo Chamber of Commerce, which had updated the 1978 Regional inventory in the Summer of 1979.

In addition, Regional staff consulted the Multiple Listing Service Computer Index Book published by the Kitchener-Waterloo Real Estate Board Inc., in order to complete the records from three Municipalities. A supplementary telephone survey was also carried out. City staff also helped in the study.

Data for the four Townships came from contacts with Municipal Office staff and in some cases the Local Chamber of Commerce or Board of Trade.

This data from the sources noted above are considered accurate as of November 1, 1979.

LAND AVAILABILITY

The 1978 inventory was prepared by using aerial photographs and calculating vacant land acreages from that source. Where property records were obtainable these were also used to supplement the air photograph measurements. The 1978 inventory has now been updated using more accurate property data and taking into account changes between 1978-1979.

The 1978 estimate of designated, zoned and serviced industrial land was as follows:

Vacant Industrial Land
Zoned and Serviced

	Acres	Percent of Total
Waterloo	311	30.5
Kitchener	125	12.3
Cambridge	400	39.3
Townships	182	17.9
Total	1,018	100

A further estimate of land which could be brought on-stream (i.e.) designated, zoned, serviced and ready for building before 1981 was as follows.

Additional Serviceable Land 1978-1981

	Acres	Percent of Total
Waterloo	115	10.5
Kitchener	154	14.1
Cambridge	822	75.3
Townships	-	-
Total	1,091	100

Based on our 1979 inventory the available serviced industrial land within the Regional Municipality is estimated to be 1,376 acres shared among member area municipalities as follows.

Estimated Vacant Zoned and Serviced Land, 1979

	Acres	Percent of Total
Waterloo	125	9.2
Kitchener	141	10.2
Cambridge	839.6	61.0
Townships	270	19.6
Total	1,375.6	100

While this seems to be a reasonable total supply to draw upon, the pattern of distribution among the three municipalities identified major imbalances. Kitchener and Waterloo are very limited not only in total supply but also in options of location. Cambridge has 61% of the available land supply.

Private and Public Land Inventory, 1979
Zoned Industrial Serviced
Acres (Per Cent)

	Vacant Land	Publicly Owned	Privately Owned
Waterloo	125	23.56 (18.8%)	102.00 (81.2%)
Kitchener	141	± 10.00 (7.1%)	± 131.00 (92.9%)
Cambridge	839.6	341.5 (40.7%)	498.1 (59.3%)
Townships	270		270 (100%)
Total	1,375.6 (100)	375.06 (27.3%)	1,000 (72.7%)

Based on the preceeding table it will be seen that private landowners, through their control of 73% of the available land, can substantially influence the industrial expansion process. If this should lead to a pricing pattern higher than the market can bear or encourage demanding conditions of sale or lease, then the effective supply of land for industrial development within the Regional Municipality is in reality much lower than the preceeding table indicates.

Even on the assumption that all land indicated is available on reasonable conditions, the individual parcel sizes themselves pose a constraint in satisfying market demand. Based on discussions with Ministry officials it has been determined that though there may be requests for parcels of three (3) acres or less, five acres represents a safe average size for a new industrial (manufacturing) operation.

Size Distribution of Industrial Parcels

(Publicly and Privately Owned)

Zoned : Serviced, 1979

	Under 5 acres Number (%)	5-15 acres Number (%)	15 acres+ Number (%)
Waterloo	23 (76.7%)	6 (20%)	1 (3.3%)
Kitchener	14 (70%)	3 (15%)	2 (10%)
Cambridge	16 (34.8%)	11 (24%)	19 (41.2%)
Townships		Not Available	
Total	53 (55.8%)	20 (21.0%)	22 (23.2%)

From the preceeding table therefore only 44.2% of the parcels existing will satisfy the average request for industrial land and most of this is located in Cambridge.

INDUSTRIAL LAND AVAILABILITY IN THE FOUR TOWNSHIPS

Within the four rural Municipalities of the Regional Municipality there is also considerable concern over the need to provide adequate supplies of serviced industrial land for investment. (Appendix 2). Though these municipalities have in general identified agriculture and related activities to be the mainstay of their economies they see a role for limited manufacturing and secondary processing activities. These include the following:

1. To process the products from the agricultural supply area.

2. To manufacture plant, equipment and other materials needed in agriculture.

3. To provide industrial and technical services needed by the agricultural sector.

4. To provide employment for surplus farm labour.

In order to satisfy these needs the Rural Municipalities have designated certain centres and areas for the location of these activities. Consequently, centres such as Elmira, St. Jacobs, Wellesley, St. Clements, New Hamburg, Baden, Ayr and Breslau and their future as manufacturing or service centres are critical to the management of the economy of these Rural Municipalities.

All four Townships are severely limited because of servicing constraints as to the number of industrial uses they can accommodate on serviced land and the type of uses which should be permitted, for fear of overloading sewage treatment plant capacities. On the other hand, in the case of North Dumfries and Woolwich Townships existence of a reasonable supply of unserviced land (where development would have to occur on private septic tank and other waste disposal systems) might be attractive to large manufacturing and warehousing/storage operations having little effluent. The primary issue in such cases should be to minimize loss of good farmland.

The 1978 industrial land survey for the four Townships identified the following calculated industrial land supply.

Available Industrial Land Supply, 1978

	Vacant Acreage	
	Serviced/ Serviceable	Septic Tank
Township of North Dumfries	42.8	759
Township of Wilmot	92.0	4
Township of Wellesley	-	10
Township of Woolwich	90.0	260
Total	225	1,033

Since 1978 a few changes have occurred in the supply of industrial land in the Townships.

1. The Township of Woolwich has proposed a restriction on the amount of industrial land to be developed in the Breslau area. The current draft Official Plan proposes restricting industrial growth in the Breslau Settlement Area to approximately 135 acres.

2. There is a proposal in the St. Jacobs Settlement Plan for 30 acres of additional industrial land.

3. Much of the lands identified in the Elmira area have problems which need to be solved before development takes place. The major problem is service connections and sewage treatment capacity. Additionally some of the parcels adjacent to the river have site and topographical constraints. One particular parcel has an access problem and a major landowner appears unwilling to sell.

4. Approximately 20 acres of industrial development is presently under consideration in the St. Clements area, Township of Wellesley.

5. South of the Baden Settlement Area in the Township of Wilmot, 67 acres of industrial land are under consideration.

6. Proposals for an additional 23.6 acres of industrial land in Baden have received Township Council approval.

7. The Township of North Dumfries, through Amendment No. 1 has removed 180 acres of proposed industrial land at the north-east corner of Ayr.

Based on the above revisions and taking into account lands developed or purchased for development between 1978-1980 the existing supply of available land in the Townships has been estimated to be:

Available Industrial Land Supply, 1979

	Serviced/ Serviceable	Septic Tank
Township of North Dumfries	43 acres	322 acres
Township of Wilmot	198 acres	5 acres
Township of Wellesley	4 acres	20 acres
Township of Woolwich	25 acres	549 acres
Total	270 acres	896 acres

For those rural industrial areas where subdivision plans are available the prevalent lot size is between 1-3 acres. This size of parcel appears adequate to meet most local needs. However, if some Rural Municipalities are prepared to accept some manufacturing and warehousing operations having little or no effluent impacts, then consideration should be given to having a greater supply of larger size parcels. This approach appears to have been started in the Highway 401/97 intersection in North Dumfries Township. The question is, how many of such developments can be permitted without major disruptions to agricultural land.

Industrial development in rural settlements will be slower than in urban areas because of the high servicing costs involved and the scale of develompent required to meet purely local needs. Notwithstanding, municipalities should be equally concerned to ensure that maximum use is made of lands which are designated and zoned for development.

In our 1978 report titled Industrial Land Needs and Supply, 1976-2001, the problem of remedying mal-distribution in industrial land supply within the Regional Municipality of Waterloo was addressed. After calculating what the industrial land shortages were likely to be in each five year period, proposals were made for satisfying these shortages. Several criteria were established and each site was assessed for its suitability. The highest potential areas in order were:

1. Two thousand acres east of the Settlement of Breslau and north of the Airport in Woolwich Township.

2. About four hundred acres in the Freeport area, north of Highway 401 and east of Highway 8.

3. Approximately 4,000 acres within the City of Cambridge forming an extension to the Lovell Industrial Park.

Both the Breslau and the Freeport proposals require the construction of a Grand River Sewer System, which now has been the subject of an indepth study.

The Industrial Land Needs and Supply Study 1976-2001 and the Grand River Sewer Study were submitted to Regional Council and were tabled.

SPACE IN INDUSTRIAL BUILDINGS

The more lucrative practice of "building for lease" rather than selling land has encouraged private developers to build several industrial malls throughout the Regional Municipality.

Incubating industries are finding their way into these malls and as long as plant specifications (i.e.) noise, odor, vibration etc., can be met, they are a welcome alternative to separate, free-standing buildings, for some kinds of businesses. Their ability to provide easy expansion into adjacent modules pre-solves some growth problems.

However, unrestricted use of these malls such as for offices, wholesaling and specialized retailing could have a drastic effect on rental rates. Planned industrial malls can meet only a portion of the need for manufacturing space.

There are an estimated 2,205,437 square feet of vacant industrial space within the three cities, distributed as follows:

Waterloo	317,741 sq. ft.	14.4%
Kitchener	805,960 sq. ft.	36.5%
Cambridge	1,081,736 sq. ft.	49.1%
Total	2,205,437 sq. ft.	100.0%

Building space as inventoried can be classified as to whether or not this space is available for lease, sale or either lease or sale.

Industrial Buildings By Lease or Sale

Square Feet (%)

	Waterloo	Kitchener	Cambridge
Lease	68,200 (21.5%)	568,205 (70.4%)	422,193 (39.0%)
Sale	69,291 (21.8%)	215,655 (26.8%)	375,243 (34.7%)
Lease or Sale	--------	15,000 (1.9%)	272,300 (25.2%)
Not Specified	180,250 (56.7%)	7,100 (0.9%)	12,000 (1,10%)
Total	317,741 (100%)	805,960 (100%)	1,081,736 (100%)

From the above it can be seen that the majority of industrial buildings are available on a lease basis with Kitchener showing a high percentage (70%) of building space for lease. Availability of such buildings will thus depend on the conditions of lease, adaptability of the building for the proposed industrial operation, location of the building within the urban area and ancillary facilities such as parking, loading, rail and road access.

Ministry officials have indicated that the most common building requirements are 5,000 square feet for industrial malls and 10,000 square feet for free-standing industrial buildings. Results of this study show that in Kitchener 39.2% of buildings are under 5,000 square feet and 60.8% under 10,000 square feet. Comparable figures for Cambridge are 15.8% and 34.2% respectively, and for Waterloo 75.0% and 79.2% respectively.

Size Distribution of Vacant Industrial Buildings

	Under 5000 sq. ft.	5000-under 10000 sq. ft.	10000-under 20000 sq. ft.	20000 sq. ft. and over
Waterloo	18 (75%)	1 (4.2%)	1 (4.2%)	4 (16.6%)
Kitchener	20 (39.2%)	11 (21.6%)	10 (19.6%)	10 (19.6%)
Cambridge	6 (15.8%)	7 (18.4%)	9 (23.7%)	16 (42.1%)
Townships		Not Available		
Total	44 (38.9%)	19 (16.8%)	20 (17.7%)	30 (26.5%)

The implications of these figures are that investors looking for existing industrial building space over 5,000 square feet and outside an industrial mall in Waterloo would have only six (6) choices, two (2) of which are between 5,000 and 10,000 square feet and four (4) of which are over 20,000 square feet. In Kitchener there appears to be a wider selection for all four size categories though there is a concentration (39.2%) in the under 5,000 square feet category. In Cambridge the reverse is true. The highest incidence of vacancies is in the over 20,000 square feet group (42.1%) of total number of vacant buildings) decreasing as the building size decreases.

These statistics on industrial building space do not reflect the age, condition, adaptability or location of the buildings concerned. These could be clues as to why they are vacant in the first place. Overall, for the three cities there appears to be an adequate selection of choices in terms of number of available buildings by size groups. Their continuing vacancy appears due to economic conditions generally or inadequacies in the buildings, or rental/purchase arrangements or a combination of these factors.

PRICE OF LAND

There is a wide range in price of private industrial land across the Regional Municipality making comparisons or deductions based on this information difficult.

The estimated price of publicly owned industrial land already zoned and serviced for sale to industry is on average:

Waterloo	- $30,000/acre
Kitchener	- $28,000/acre - $30,000/acre
Cambridge	- $29,900/acre
Townships	- $27,500 - $32,500 1/

In comparison it may be noted that the Town of Fergus offers land at $10,000 per serviced acre and the City of Guelph has established a price of $30,000 per serviced acre. At the same time private owners of industrial land in Guelph offer serviced land for sale on a range of between $35,000 - $50,000 and more in some cases. One could therefore conclude that as long as shortages in supply of public serviced land continue or that parcel sizes are unsuited to demand, persons owning such land will attempt to obtain the highest possible returns for their land.

City of Waterloo

The quoted price for public land of $30,000 per serviced acre includes a unit levy of $4,000. All services are supplied to the property but connections are additional. Serviced roads within the subdivision will be surfaced with a gravel or chip cover. Lots are sold as is. The purchaser bears the costs of grading.

City of Kitchener

Public land price of $28,500 - $30,000/acre for serviced lots in the City of Kitchener includes all services available at the property line. Industrial subdivisions are served with paved internal roads. The City does not impose either a lot or a unit levy.

City of Cambridge

The price for serviced industrial land in the City of Cambridge is $29,900 an acre, basic. Lots are graded and roads are surfaced with an asphalt coat. However, the price may increase to between $35,000 and $45,000 an acre. The difference in price is due to the size of the parcel and its location. Industrial land is sold in sizes of 1 acre, 1-3 acre increments, 5 acre parcels, increments of 5 acres, and parcels of 25 acres. The highest price range is for parcels of 1-5 acres in size.

1/ Woolwich, Privately Owned

Townships of North Dumfries, Wellesley, Wilmot and Woolwich

There is no publicly owned land within the four rural municipalities, and as indicated earlier, only a very minimal supply of serviced private industrial land. Existing industrial land is all privately held and the asking price varies widely by municipality, location within the municipality, size of parcel and exposure to road and rail. For example within the Elmira Industrial Area, parcels of land within the same subdivision range from $27,500 for a one acre parcel away from the main road to $160,000 for a four acre parcel abutting the highway.

RENTAL/LEASE OF INDUSTRIAL BUILDING SPACE

The rental and leasehold market for vacant industrial buildings within the Regional Municipality of Waterloo is exclusively a private sector investment area. Rental rates vary widely and are influenced by age of building, design of building, adaptability of interior space, flexibility in use, single occupancy versus multiple occupancy, location and accessibility. Rates may further vary depending on whether or not additional options are included in the rent or lease arrangements. These would include hydro, heating, sewers, air conditioning, etc.

Within the City of Waterloo the prevalent rates for newer industrial buildings is $2.00 per square foot, net-net (i.e. heating, hydro etc., must be paid separately by the tenant). The area to which this charge is applicable includes all interior floor space, docking and loading area, and parking area.

Estimated rental rates within the City of Kitchener range from $1.80 - $2.25 per square foot (net-net) for newer industrial buildings with some further variations in price according to facilities. Rates for older buildings vary from $0.85 to $1.75 net-net. These charges apply to internal space, parking and loading areas. Older buildings sometimes include heat in the above rates.

Industrial building rental rates in the City of Cambridge generally are in the vicinity of $1.95 per square foot net-net, for single occupancy buildings and from $2.20 - $2.43 per square foot net-net for multiple occupancy buildings. These prices apply generally to newer industrial buildings.

No data is available on the amount of vacant industrial building space available in the Townships. In most cases, any buildings available in the Township would be older quality stock with very low demand other than in Elmira where there may be some new ones. Rents applicable in such cases would not be representative.

In comparison to municipalities within the Regional Municipality of Waterloo, rental rates within the City of Guelph have been estimated to range between $1.65 to $1.75 and upwards for most newer building space. In older buildings the rates may be lower than $1.65 net-net. Depending on additional options such as air conditioning and carpeting, rates could extend to $4.00 or even $5.00 per square foot, net-net.

Depending on demand and supply of industrial building space, the market for rental industrial buildings could be quite lucrative. Design of "industrial mall" space to accommodate a variety of alternative users permitted in the zoning by-law by increasing the range of potential tenants makes the market more buoyant. As a result, industrial malls so-called are in reality oriented to the goods retailing, goods servicing, business servicing and personal services retailing market and only be default to primarily manufacturing operations.

Speculative investment in industrial building would therefore favour mall-type construction over primarily free-standing manufacturing buildings. As a result this deficiency could continue despite a sizeable inventory of available industrial building space.

Since this report has been in preparation, the City of Kitchener has been discussing a large private industrial park on its western edge and Waterloo is considering the formation of an economic development committee. These are signs of action and concern.

SUMMARY OF CONCLUSIONS

Industrial growth and industrial stability are not ends in themselves. They are however major contributors to maintaining a stable community wherein residents can live, work and find fulfillment. Other communities are more dependent on manufacturing than ours. One example is Hamilton-Wentworth. Other communities are more dependent on a particular industrial activity, e.g. Oakville or Sudbury. Fortunately, this community has a diversified economic base so it is critical that as some activities decrease in relative importance favourable opportunities exist for new activities to replace them. For this to occur there must be an adequate supply of serviced industrial land at reasonable prices, available in the sizes required and in those locations suitable for maximum production and efficient distribution. Some of the points of concern within this report are as follows:

1) The supply of vacant serviced industrial land is unevenly distributed within the Regional Municipality of Waterloo.

2) The private sector controls much of the industrial land development in Kitchener, Waterloo and the Townships.

3) There is recent action by the Cities of Kitchener and Waterloo towards an expanded municipal involvement in industrial land supply.

4) Some private landowners now appear willing to release some of their lands for sale for client building. However, in general, private industrial landowners prefer to build and lease while incoming industry prefers outright purchase.

5) Opportunities being lost in Kitchener and Waterloo in particular, because of industrial land shortages are probably going to Guelph, Brantford, Cambridge and Stratford. However, Cambridge is not attracting all the demand that Kitchener and Waterloo are unable to handle. Why?

6) Many industries identify with a particular community and want to keep that identification. This tends to prevent relocation of industries from one community to another, or in the case of new industries, substitution of another location within the Region in place of the original preferred location.

7) The trend towards industrial malls has been a mixed blessing. They have attracted a wide range of land uses within the industrial zones and consumed land needed for traditional manufacturing activities. At the same time because of flexibility in design they are capable of accommodating a wide variety of operations should conditions so require. There is however, some necessity for a more discriminating list of uses which should be permitted in industrial areas in all three municipalities. This concern has already attracted some municipal attention. The City of Waterloo has recently completed just such a revision.

8) Experience has shown that whereas the process of growth is a cumulative one, that is growth feeds upon itself, the process of decay is also cumulative. Unless growth continues, the economy, whether National, Provincial, Regional or Local is likely to decline. The evidence of such situations is recorded in history.

9) A passive role by Governments at all levels will not do. The Provincial economy faces uncertain growth and the Province has embarked upon an ambitious program of promotion. How to react within this Region is the question to be addressed in the next few years.

SUGGESTIONS FOR DISCUSSION

We state in the beginning that the Regional Municipality of Waterloo, by its Act, is not permitted to purchase and develop land for industrial purposes. We do not propose any change.

The Regional Municipality of Waterloo is permitted however, to study the region-wide economic picture, analyse and publish the results. Reports like this one partially fulfill that role.

The Regional Municipality of Waterloo, according to its Act, is permitted to "make expenditures for the purpose of diffusing information respecting the advantages of the regional municipality as an industrial, business, educational, residential or vacation centre and may make annual grants for a period not exceeding five years, and upon the expiration of any such period may make similar grants for a further period not exceeding five years". Perhaps it is in this field that the Region as a Municipality can make a contribution.

Whether we wish to agree or disagree on the economic significance of the Regional Municipality in Ontario, Canada or even North America, it is perceived as a Municipality as such by a great many investors and new job providers.

The Regional Municipality is no more or no less than the combination of seven municipalities each making a considerable contribution which places the Region as a whole in an enviable position as a prime economic area, residential area, cultural and educational area, commercial area and a recreation area. - Region-wide opportunities that can be advertised and exploited during this period of economic uncertainty. It is something that only the seven area municipalities can do together and which the Region as a Municipality might offer its help, expertise and time.

It is time to discuss the advantages of the seven area municipalities joining together in some kind of cooperative venture to advertise at one time to all and sundry the widely held benefits of each municipality for new investors considering this Region; to indicate not only the industrial and commercial opportunities throughout the Region but the varied housing, cultural, recreational and educational benefits to the workers of new industry, of new investors; to indicate the locational benefits the Region enjoys on the transportation pathway between the American mid-west and southern markets and the Toronto-Montreal markets to the east, and the world-wide markets via Hamilton Harbour; and to extol the benefits of the Lake Huron-Georgian Bay summer playground and the power from the Bruce generating plant. As seven area municipalities, every conceivable benefit an industrialist seeks is within the regional boundaries. A widely diversified skilled labour force, a tremendously important industrial diversification offering economic linkages for almost any type of industry, and good rail, road and air access is present within the Region.

For discussion may we suggest that the seven area municipalities consider the organization of a region-wide advisory committee consisting of representatives from each municipality, from industry, commerce, finance, the varous chambers and/or boards of trade, labour, the Province and Municipal Councils. This committee need not have staff but could recommend on joint ventures. The Region could contribute to joint advertising in a major way, that would send information on a region-wide basis, via the news media and publications, to the market places of the World. It is something the Province could help with in their industrial promotion venture during the 80's.

If we are to <u>maintain</u> our economic base and continue creating job opportunities throughout the Region, we feel that the time is ripe to act in a joint manner. At least the idea should be thoroughly and widely discussed without jeopardizing the traditional role of the area municipality in the industrial development field.

This "committee" could address questions on the method of supplying information in one package on every municipality and service in a condensed version to prospective investors, of steering certain prospects to the smaller settlements within the Region, of striking some agreements on pricing and lotting and conditions of sale in order not to place one municipality in opposition to another. Perhaps most important of all this advisory committee could suggest an economic development strategy for us all to embrace and work toward cooperatively. The method of communicating information might also be considered by this committee.

We would also like to suggest that perhaps the planners employed by municipalities within the Region, at their monthly meetings, review all existing industrial zoning by-laws. This review might consider whether site coverage is too restrictive in light of questions of energy efficiency and conservation, cost of money, and new techniques being utilized in industry in terms of machinery, division linkages, etc. Uses of a non-industrial nature permitted within industrial zones to be reviewed in light of the scarcity of good serviced industrial land.

We are not suggesting that we will solve the economic problems of the 80's by making the above suggestions. We are suggesting however, that there is a problem and we will not solve it by acting each in his own separate way. We must join forces as municipalities with one large joint voice and a commitment to create a strategy and act together and in tune with the Province. Many other municipalities are already tuning up and we must join the wagon or be lost in the ebb of other larger municipal organizations.

As Commissioner of Planning and Development for the Region I am concerned about growth and jobs for the Region's citizens here and yet to come.

Respectfully submitted for discussion.

Bill Thomson

Bill Thomson, M.A., M.C.I.P.
Commissioner of Planning
and Development

APPENDICES

1. Ralph Smith

   LAND PRICE SURVEY

   Industrial Commissioner's Office
   City of Guelph, May 1979

2. Summary of vacant industrial land and buildings by municipality.

APPENDIX 1

LAND PRICE SURVEY

MAY, 1979.

MUNICIPALITY	LOT SIZE COVERAGE	PRIVATE - LAND/ACRE	CITY - LAND/ACRE
GUELPH	Not at present.	Yes - price negotiable. $35,000.00 to $48,000.00 per acre. Some being developed under the Local Improvement Act. Only 50 acres rail oriented, serviced and unserviced.	All lands owned by the City and not under option be set at $30,000.00, $35,000.00 and $45,000.00 per serviced acre with grading to be minimal and in accordance with a revised plan to be prepared by the City Engineer.
BARRIE	Yes. Based on a sale of five acres they would have to put up a building of not less than $150,000.00 value - based on the building permit value.	Alliance Building Corporation - $50,000.00 to $55,000.00 per acre, M-1; services available. Private - $45,000.00 to $55,000.00 per acre, services available.	City owned land is presently priced at $22,500.00 to $24,500.00 per acre, fully serviced.
BELLEVILLE	Yes. Minimum coverage factor of 20%, but it is flexible. Maximum coverage factor of 65%.	(1) $15,000.00 to $20,000.00 unserviced at present and only some of this may be serviceable. (2) $10,000.00 to $15,000.00 - which is unserviceable. (3) $25,000.00 - 60 acres - can be serviced. May be ready by fall of 1979.	Industrial land is priced at $14,500.00 per acre, fully serviced with water and sanitary sewers for both Parks. Rail services available to one Park. Gas is also available. Approximately 165 acres are available.
REGIONAL MUNICIPALITY OF PEEL (Brampton)	Covered by Zoning By-Laws.	$75,000.00 to $85,000.00 per acre, for fully serviced land. Will build for sale as a package and some land by itself, can be bought on occasion.	None.
BRANTFORD	Yes. Minimum coverage guideline of 15% of land area.	Privately owned, fully serviced industrial land - none available.	A base price of $20,000.00 per acre (4.0 acres and up) with a percentage increment ranging between 5% and 15% for smaller acreages. This price includes all services such as: roads, curbs, gutters, paving, etc. Approximately 288 acres available.

BURLINGTON	Have to guarantee a minimum building size - there was a size set on each parcel. i.e.: 4.212 acres - minimum building size of 35,000 sq.ft. 5.652 acres - minimum building size of 40,000 sq.ft.	There is land. Pricing is in a state of flux at this time.	Centennial Business Park - $33,900.00 to $38,300.00. i.e.: $38,300.00 - Rail $33,900.00 - $38,300.00 - Fairview-Harvester $33,900.00 - Internal lots Includes services - no local improvement charge.
CAMBRIDGE	Yes. 20% coverage is the general rule.	Generally $5,000.00 per acre more than the City; $35,000.00 to $45,000.00 per acre (includes servicing and grading). Raw land price of $10,000.00 to $25,000.00 per acre.	550 acres in various stages. 1979 prices range from $29,900.00 to $40,000.00 per serviced acre (includes grading). Along Highway 401, the price is $40,000.00 per serviced acre.
CHATHAM	Yes. Loose measurement - building covering 20 to 25% total area sold and at least ten jobs per acre.	$22,000.00 to $45,000.00 per serviced acre. Presently 95-100 acres available.	$12,500.00 per serviced acre, including rail. Presently 42 acres available.
KITCHENER	Yes.	$45,000.00 to $60,000.00 per acre. Still have to pay locals. Lot Levy.	$28,500.00 to $30,000.00 per acre, fully serviced in Industrial Park. No lot levy. Two special sites priced at $30,000.00 per acre.
LONDON	Yes. 15% minimum coverage. Maximum controlled by City Zoning By-Laws and generally speaking 75% coverage is allowed.	$8,000.00 to $10,500.00 per acre, not serviced. $30,000.00 to $35,000.00 per acre, serviced.	$19,500.00 per acre for large acreages. $30,000.00 per acre for small acreages, (1 to 5). Certain areas have rail. Prices include all service installations.
MILTON	No, except in the vicinity of Highway 401, then building has to be 10,000 sq.ft.	Price ranges from $35,000.00 to $50,000.00 per acre. Services on locals - $2,500.00 per acre. Rail available.	None.

MISSISSAUGA	Average maximum coverage - 50% with Site Plan Approval.	Prices at $60,000.00 to $120,000.00 per acre. Mississauga Road and Highway 401 - $90,000.00 to $125,000.00 (high prestige area). Lots are all serviced. Rail is available to some locations only. 900 acres now available.	Land priced at $95,000.00. Three (3) acres left. No rail.
OAKVILLE	No.	Majority of the land is privately owned. There are two industrial parks to be fully serviced. West Oakville - one small industrial park now being developed and a second, adjoining, is pending. Land is zoned M2, M3 and M4. M2 - Prestige industry (i.e.: on the Q.E.W.), some outdoor storage, no rail. Priced at $70,000.00. M3 - Heavy industry (i.e.: steel industry or cement manufacturing), rail, outdoor storage. Priced at $60,000.00 to $70,000.00. Land is expensive and scarce. M4 - Same as M3. The above prices include servicing.	Very little land is available.
REGIONAL MUNICIPALITY OF DURHAM (Oshawa)	Basically 40 to 50% coverage. (Judge the project on its merit.)	Exact acreage is unknown. Average price of $55,000.00 per acre, serviced. Prices range from Bowmanville at $25,000.00 to Pickering at $60,000.00 to $65,000.00 (lake front). Port Perry - $23,000.00 per serviced acre.	Municipally owned - Average price, City of Oshawa - $35,000.00 to $40,000.00; Bowmanville - $25,000.00, partially serviced. Regionally owned - Whitby - $45,000.00 to $55,000.00; Sunderland - $12,000.00 to $15,000.00 - with water. Oshawa and Whitby - well over 1,000 acres, fully serviced, with harbour and airport facilities.

PETERBOROUGH	60% coverage, according to Zoning By-laws.	Very little land is available - approximately 39 acres. $35,000.00 and up per serviced acre.	220 acres, serviced and unserviced. The new Peterborough Industrial Park is priced at $15,000.00 per acre, perimeter serviced included (underground services, sod). Rail service is available.
REGIONALY MUNICIPALITY OF HAMILTON-WENTWORTH (Saltfleet)	Only on City of Hamilton owned land - minimum lot coverage is 25%.	Western Development Area - Stoney Creek, rail service, average price $60,000.00 per acre, fully serviced - 250 to 300 acres. Temporarily Frozen by the Ontario Government - Fruitland Winona Development Area, Stoney Creek, rail service, $15,000.00 to $25,000.00 per acre, with all services except sanitary sewers (in progress) - 1,000 acres. Glanbrook Development Area - $15,000.00 per acre, unserviced - 800 acres. Flamboro - $15,000.00 to $25,000.00 per acre, unserviced - 500 acres.	700 acres on the Mountain at Highway #53. $40,000.00 to $65,000.00 with the average being $50,000.00 per acre. Servicing in progress. (Some services completed). Ancaster - $7,500.00 to $15,000.00 per acre. Servicing in progress. 750 acres.
ST. CATHARINES	On the maximum site coverage, yes. Either 50-60% depending on location. Minimum lot size of one acre - minimum building size of 5,000 sq.ft. (Port Weller.) Will advise on the in-betweens.	$35,000.00 to $45,000.00 per acre and up, fully serviced. 10 to 15 acres available.	35 serviced acres available now. Property fronting on Lakeshore Road - 1 to 5 acres - $20,500.00 per acre. Balance of park - 1 to 5 acres - $18,500.00 per acre, 5 to 10 acres - $17,500.00 and 10 acres and over - $16,500.00. Air, land and sea facilities. Rail siding is available at $500.00 more per acre.
STRATFORD	Generally speaking, yes. They have a site plan agreement which must be complied with - 50% of the land sold, must be used.	Priced at $15,000.00 per acre. (Raw land. Depends where it is.)	City owned land presently priced at $16,000.00 or $18,000.00 with rail, per serviced acre. 140 acres available.

WATERLOO	Technically - yes. Minimum of 10% lot coverage.	Cambridge Leaseholds - $35,000.00 per acre. Approximately 25 acres still available.	$30,000.00 per serviced acre, includes unit levy. City owned land now available with services - 40 acres. 15 acres with rail service.
WINDSOR AND ESSEX COUNTY	Yes. Minimum lot size coverage of 15%.	Anywhere from $20,000.00 to $40,000.00 per acre for fully serviced land. $5,000.00 to $25,000.00 per acre for land in the County - depends on services and location. Total acreage available - 1,500 acres to 2,000 acres.	Walker Industrial Park - 250 acres - $22,000.00 to $30,000.00, fully serviced. (Price depends on the size of the lot - high acreage, lower price - low acreage, higher price.) Ambassador Industrial Park - 15 acres - $40,000.00 to $100,000.00. ($40,000.00 for internal sites; $100,000.00 for highway sites.) Fully serviced.
WOODSTOCK	No.	Along Highway 401, land is available from $12,000.00 per acre, unserviced. Total acreage available is 100 acres to 150 acres. Near Highway 401 - 135 acres - $12,000.00 to $18,000.00.	$12,000.00 to $18,000.00 - plus services. Services are available to the boundaries. Total acreage available - 100 acres.

APPENDIX 2

110

WATERLOO

Summary

110

1) Industrial Land Available for Lease or Sale

Lease or Sale	Area in Acres	Percentage Breakdown
Lease		
Sale	51.766	41.2
Not Specified	73.896	58.8
Total	125.662	100

2) Industrial Buildings for Lease or Sale 78,041 sq. ft.

Lease or Sale	Floor Area (Sq. Ft.)	Percentage Breakdown
Lease	7,500	9.6
Sale	69,291	88.8
Not Specified	1,250	1.6
Total	78,041	100

3) Industrial/Commercial Space Available 239,700 sq. ft.

Lease or Sale	Floor Area (Sq. Ft.)	Percentage Breakdown
Lease	60,700	25.3
Sale	-	-
Lease or Sale	-	-
Not Specified	179,000	74.7
Total	239,700	100

4) City owned Industrial Land 23.56 acres

Parcel #1 3.3 acres
#2 5.3 acres
#3 10.0 acres
#4 3.5 acres
#5 1.46 acres

APPENDIX 2

INDUSTRIAL SPACE

111 KITCHENER 111

Summary

Available Industrial Land

Lease or Sale	Total Area (Acres)	Percentage of Breakdown
Lease		
Sale	134.935	95.5
Lease or Sale	5.25	3.7
Not Specified	1.18	0.8
Total	141,365	100

Available Industrial Buildings

Lease or Sale	Total Floor Space (Sq. Ft.)	Percentage of Breakdown
Lease	568,205.293	70.4
Sale	215,654.8	26.8
Lease or Sale	15,000	1.9
Not Specified	7,100	0.9
Total	805,960.093	100

APPENDIX 2

112

CAMBRIDGE

Summary

112

Private Industrial Land Available

Lease or Sale	Total Area (Acres)	Percentage Breakdown
Lease	40.937	11.6
Sale	226.614	64.1
Lease or Sale	5.95	1.7
Not Specified	80	22.6
Total	353.501	100

Cambridge Industrial Park:

	Acres
City Industrial Land	341.542
Private Industrial Land	144.553
Commercial Land	25

Total Industrial Land

Ownership	Total Area (acres)	Percentage Breakdown
City	341.542	40.7
Private	498.054	59.3
Total	839.596	100

Available Industrial Buildings

Lease or Sale	Total Floor Space (Sq. Ft.)	Percentage Breakdown
Lease	422,193	39.
Sale	375,243	34.7
Lease or Sale	272,300	25.2
Not Specified	12,000	1.1
Total	1,081,736	100

Commercial and Retail Buildings - Total Floor Area 235,453 Sq. Ft. (Lease)

APPENDIX 2

Available Industrial Land - Size Categories

113

City and Private

WATERLOO

Size Category (Acres)	No. of Properties	% Age Distribution	No. of Acres	% Distribution of Area
0-4.9	5	16.7	4.606	4.6
1-4.9	18	60	28.774	28.9
5-14.9	6	20	48.584	48.8
15-24.9	1	3.3	17.61	17.7
25-34.9				
35-44.9				
45-54.9				
55+				
Total	30	100	99.574	100

KITCHENER

0-0.9	3	15	1.75	1.2
1-4.9	11	55	24.115	17.1
5-14.9	3	15	22	15.6
15-24.9	1	5	20	14.2
25-34.9	0			
35-44.9	2	10	73.3	51.9
45-54.9				
55+				
Total	20	100	141.165	100

APPENDIX 2

114

Available Industrial Land Categories

(City and Private)

CAMBRIDGE

Size Category (Acres)	No. of Properties	%age Distribution	No. of Acres	Percentage Distribution of Area
0- 0.9	3	6.5	1.793	0.2
1- 4.9	13	28.3	31.617	3.7
5- 14.9	11	24	113.085	13.2
15-24.9	4	8.7	77.04	9.0
25-32.9	6	13.0	164.227	19
35-44.9	4	8.7	154	17.9
45-54.9	3	6.5	157.781	18.4
55+	2	4.3	160.053	18.6
Total	46	100	859.596	100

APPENDIX 2

115

INDUSTRIAL BUILDINGS

Size Category Breakdown

KITCHENER

Size Range (Sq. Ft.)	No. of Buildings	%age Breakdown	Total Area (Sq. Ft.)	%age Breakdown
0-999	2	3.9	1,350	0.2
1,000- 4,999	18	35.3	49,903	6.2
5,000- 9,999	11	21.6	78,345.8	9.7
10,000-19,999	10	19.6	141,538	17.5
20,000-29,999	4	7.8	90,000	11.2
30,000- +	6	11.8	444,823	55.2
Total	51	100	805,309.8	100

CAMBRIDGE

0-999	1	2.6	840	0.1
1,000- 4,999	5	13.2	15,130	1.4
5,000- 9,999	7	18.4	48,643	4.5
10,000-19,999	9	23.7	121,314	11.2
20,000-29,999	7	18.4	168,602	15.6
30,000- +	9	23.7	727,207	67.2
Total	38	100	1,081,736	100

WATERLOO

116

Size Range (Sq. Ft.)	Number of Buildings	%age Breakdown	Total Area (Sq. Ft.)	%age Breakdown
0-999	0	0	0	0
1,000-4,999	18	75	46450	14.6
5,000-9,999	1	4.2	8666	2.7
10,000-19,999	1	4.2	13625	4.3
20,000-29,000	0	0	0	0
30,000- +	4	16.6	249000	78.4
Total	24	100	317,741	100

Note: Figures for Waterloo consist only of those buildings described as Industrial Commercial.